FAS REPORT

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Service
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WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE WR 43-83

WASHINGTON, Oct. 26--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

GRAIN AND FEED

The October issue of the USSR's official statistical journal, Vestnik Statistiki, reported preliminary data on sown area for 1983 crops. The data include the following (in 1,000 hectares):

All grains and pulses	122,456
Wheat	50,756
Coarse grains	62,572
Cotton	3,189
Sunflowers	4,305
Soybeans	886
Sugar beets (industrial)	3,515

OILSEEDS AND PRODUCTS

FISHMEAL EXPORTERS ORGANIZATION (FEO) COUNTRIES, which account for the bulk of world fishmeal supplies traded in world markets produced 868,000 tons during Jan-Aug 1983, down 27 percent from the same eight months in 1982. Fishmeal exports during the same period dipped to 704,000 tons, down 25 percent from the same period a year ago. Fish meal stocks on August 31, 1983 were down by two-fifths from a year earlier. The data are as follows in 1,000 tons:

Country	Jan-Aug 1982 Production	Exports	Ending Stocks	Jan-Aug 1983 Production	Exports	Ending Stocks
Chile	491	357	330	483	362	257
Iceland	38	42	20	33	29	4
Norway	185	127	77	223	179	55
Peru	473	415	171	129	134	42
Total	1,187	941	598	868	704	358

During August 1983, fishmeal production by the FEO countries amounted to 78,000 tons, 40 percent below the same month a year ago. At 89,000 tons, fishmeal exports in August exceeded production but fell 45 percent below the August 1982 volume.

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In early October, fishmeal prices, basis Europe, averaged about $515 per ton, 57 percent above the same month a year ago. The decline in fishmeal production, exports and stocks, has helped to push the fishmeal/soybean meal price ratio to about 1.78 to 1 compared with 1.55 to 1 a year ago.

DAIRY, LIVESTOCK AND POULTRY

Cattle hide production in 36 SELECTED COUNTRIES is expected to be 4.272 million tons in 1984, down 1 percent primarily due to reduced production in the United States and Australia.

The major cattle hide exporters--the United States, Australia, New Zealand, Canada, South Africa and Argentina--are expected to produce 1.580 million tons of hides in 1984, down 3 percent from 1983 and the lowest production since 1973. From 1975 to 1978, the major exporters were reducing herd size and produced between 1.9 to 2.0 million tons of hides per year. Since 1979, hide production by the major exporters has remained at about 1.6 million tons. With the continued weak markets for beef, there is little prospect for any major change in their hide production.

Hide production in the EC-10 has been slightly less than 700,000 tons per year since 1979. Cattle hide production in Eastern Europe has declined since 1979 as a result of the gradual decline in cattle numbers. In the Soviet Union and Brazil, production has expanded with the increase in cattle numbers since 1979.

Hide Production in Selected Countries
(1,000 Metric Tons)

Country	1979	1980	1981	1982 1/	1983 1/	1984 1/
United States	964	964	987	1,020	1,038	1,001
Australia	158	149	142	168	140	131
Canada	89	91	96	98	96	95
South Africa	64	60	52	53	53	51
New Zealand	44	40	44	46	48	43
Argentina	358	322	333	293	259	259
Subtotal	1,677	1,626	1,654	1,678	1,634	1,580
EC-10	682	698	683	667	678	679
USSR	867	867	890	890	950	950
Brazil	281	280	291	308	322	322
Selected Country Total 2/	4,240	4,202	4,265	4,308	4,321	4,272

1/ Based on August 1, 1983 reports.
2/ 36 countries estimated to account for over 60 percent of world cattle hide production and over 80 percent of world trade.

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TOBACCO

TURKEY's Ministry of Commerce announced minimum export prices for 1982 unmanufactured tobacco, effective October 13, 1983, and disclosed discount prices for 1979, 1980 and 1981 exportable tobacco stocks. The 1982 crop export prices for Aegean Grade (AG) leaves and scrap tobacco were unchanged from the 1981 crop prices announced a year ago at $4.30 and $0.45 per kilogram, respectively. However, prices of all other Aegean Grades, B grade particularly, have been reduced ranging from 14.5 percent to 6.2 percent. Exporters and foreign buyers are reportedly pleased with the announced prices.

Growing surplus stocks with the State Monopoly and difficulty of marketing lower quality leaves, from the 1981 crop forced the government to reduce prices this year for certain grades. Comparable Greek tobacco grades were reported to be selling at prices around 20 percent less. Private exporters have also been suggesting that the export tax for tobacco be lifted in order to stimulate exports.

SUGAR

WORLD centrifugal sugar production in 1983/84 is estimated at 94.7 million tons (raw value), 6 percent below the revised 1982/83 output of 101 million tons. World production of sugar from cane is expected to account for 60.4 million tons (63.8 percent) and sugar from beets, 34.3 million tons. Low world sugar prices resulted in a reduction in beet and sugarcane area. In addition, poor growing conditions in several countries further reduced yields of sugarcane and sugarbeets.

Sugar production in the European Community which accounts for 12 percent of the total is estimated at 11.4 million tons, down 23 percent from the 14.8 million tons produced in 1982/83. The area harvested, estimated at 1.7 million hectares, is 10 percent lower than last year, and the sugar yield per ton of beets is also expected to be lower.

In other European countries, Spain is expected to produce 5 percent more sugar following an increase in beet area and a higher sugar yield. Poland's output is expected to be down 2 percent from a year ago but will exceed all other recent yearly levels.

Estimated at 8.5 million tons for 1982/83, sugar output in the Soviet Union would be 15 percent more than the previous year. Sugar beet production will likely be the highest in recent years as a result of excellent yields. In addition to increased tonnage, weather conditions in the USSR have favored a relatively high sugar yield. A mild winter and early spring in the sugar beet region enabled Soviet farms to plant beets during the optimal seeding dates. Dry sunny fall weather to date has allowed harvest and transport under near ideal conditions.

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Brazil and Cuba, Latin America's two major sugar producing countries, account for over 65 percent of the region's total output. Brazil is expected to regain its position as the world's largest sugar producer by producing a record 9.4 million tons of raw sugar from 100 million tons of cane. Harvested area is expected to increase 1 percent. In Cuba, production is estimated at 7.5 million tons, 4 percent above the reported 1982/83 output of 7.2 million.

Sugar output in three of the six largest producing countries in Asia (India, Philippines and Thailand) is expected to decline in 1983/84. In China and Indonesia increases of only 1 percent are anticipated, and in Pakistan an 8-percent increase is expected due to higher sugarcane yields and a higher recovery rate. India, the world's largest sugar producer in 1982/83 with a 9.6 million ton output, is expected to produce only 8.5 million tons (including 530,000 tons of khandsari) in 1983/84, as lower prices have led to an 8-percent decrease in cane area. Sugar production in the Philippines in 1983/84 is estimated at 2.28 million tons, down 10 percent from last year.

South Africa's sugar production in 1983/84 is expected to drop to 1.5 million tons, 32 percent below the 1982/83 output.

Regional estimates are as follows in 1,000 tons:

	1982/83		1983/84	
Region	Beet	Cane	Beet	Cane
North America	2,593	5,908	2,580	5,635
South America	276	14,038	351	14,039
Central America	0	1,765	0	1,794
Caribbean	0	8,998	0	9,347
European Community	14,824	0	11,360	0
Other West Europe	2,450	22	2,207	17
East Europe	6,059	0	5,813	0
USSR	7,392	0	8,500	0
North Africa	376	1,109	339	1,090
Other Africa	0	5,856	0	5,124
Middle East	2,012	100	1,836	100
Asia	1,419	21,757	1,328	19,924
Oceania	0	4,032	0	3,280
Total, by type	37,401	63,585	34,314	60,350
Total Centrifugal Sugar	100,986		94,664	

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Selected International Prices

Item	Oct. 25, 1983		Change from previous week	A year ago
ROTTERDAM PRICES 1/	$ per MT	$ per bu.	$ per MT	$ per MT
Wheat:				
Canadian No. 1 CWRS-13.5%.	208.50	5.67	+2.00	N.Q.
U.S. No. 2 DNS/NS: 14%...	187.50	5.10	+1.00	171.00
U.S. No. 2 DHW/HW: 13.5%..	N.Q.	--	--	N.Q.
U.S. No. 2 S.R.W..........	160.00	4.35	-1.50	136.00
U.S. No. 3 H.A.D.........	200.00	5.44	+1.00	171.50
Canadian No. 1 A: Durum..	210.00	5.72	+2.00	191.00
Feed grains:				
U.S. No. 3 Yellow Corn....	161.00	4.09	-0.50	100.50
U.S. No. 2 Sorghum 2/.....	N.Q.	--	--	N.Q.
Feed Barley 3/...........	N.Q.	--	--	N.Q.
Soybeans and meal:				
U.S. No. 2 Yellow.........	327.50	8.91	-14.50	209.00
Brazil 47/48% SoyaPellets 4/	290.00	--	-8.00	200.00
U.S. 44% Soybean Meal.....	267.00	--	-10.00	191.00
U.S. FARM PRICES 5/				
Wheat.....................	129.71	3.53	-2.20	121.25
Barley....................	95.08	2.07	-6.43	57.41
Corn....................	127.95	3.25	-3.94	78.34
Sorghum..................	113.98	5.17 6/	-3.53	78.26
Broilers 7/..............	1166.23	--	-2.65	N.A.
EC IMPORT LEVIES				
Wheat 8/.................	78.00	2.12	+3.70	106.40
Barley....................	57.75	1.26	+6.50	102.50
Corn......................	49.90	1.27	+8.60	108.30
Sorghum..................	67.80	1.72	+10.10	100.90
Broilers 9/..............	254.00	--	-2.00 10/	285.00
EC INTERVENTION PRICES 10/				
Common wheat(feed quality)	170.90	4.65	+0.65	172.15
Bread wheat (min. quality)	187.60	5.11	+0.70	190.10
Barley and all other feed grains.......	170.90	--	+0.65	172.15
Broilers 11/.............	1145.00	--	722.00	1125.00
EC EXPORT RESTITUTIONS (subsidies)				
Wheat 12/................	40.35	1.10	-4.25	76.70
Wheat flour..............	N.Q.	N.Q.	N.Q.	N.Q.
Barley....................	23.45	0.51	0.95	68.35
Broilers 9/..............	174.00	--	-1.00 10/	189.00
Sugar, refined	N.Q.	N.Q.	N.Q.	N.Q.

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Optional delivery: Argentine Granifero sorghum. 3/ Optional delivery: Canadian feed barley. 4/ Optional delivery: Argentine. 5/ Based on selected major markets and adjusted to reflect farm prices more closely. 6/ Hundredweight (CWT). 7/ Twelve-city average, wholesale weighted average. 8/ Durum has a special levy. 9/ EC category--70 percent whole chicken. 10/ Reflects lower EC export subsidy-down to 20.00 ECU/100 bag effective 14 Sept 83 from 22.50 ECU/100 bag set in Feb 1983. 11/ F.o.b. price for R.T.C. broilers at West German border. 12/ Corrective amount in ECU's: Oct. -5, Nov. -8, and Dec. -10. Jan. zero. N.Q.=Not quoted. N.A.=None authorized. Note: Basis November delivery.

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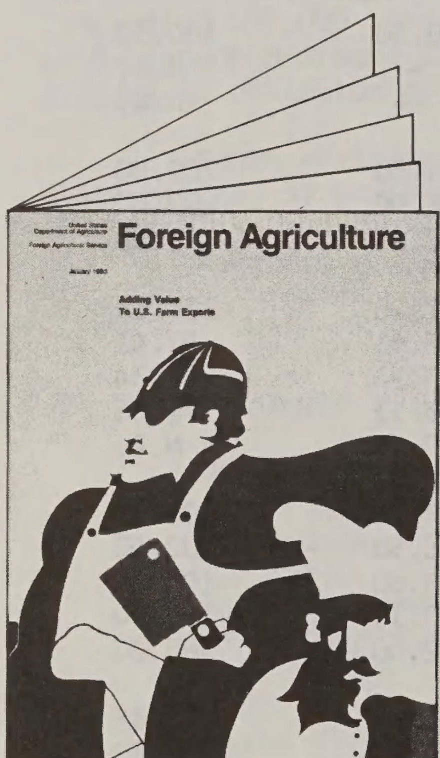

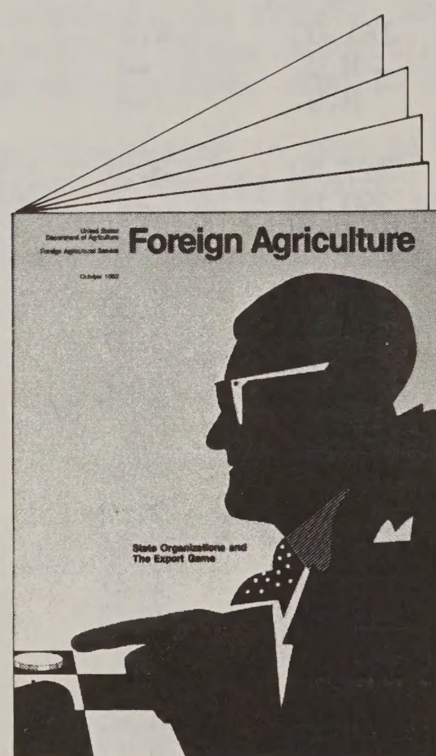

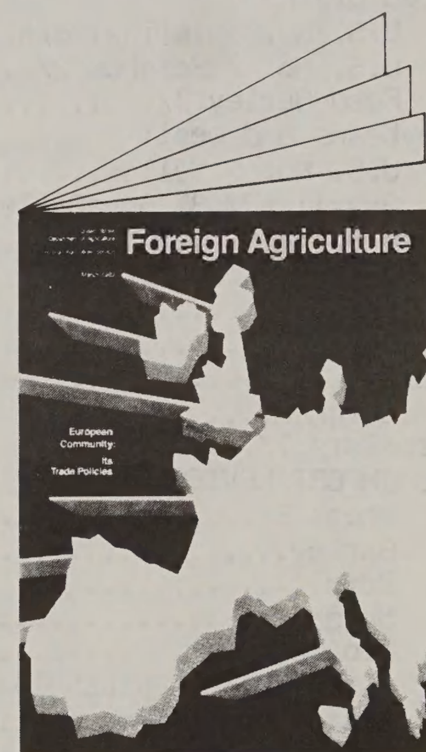

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